



Walkin Wealth **BlueStar**

authorised by  **Sanlam**

Get the financial advice you need

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Financial Planning | Retirement | Insurance | Health | Investments | Wealth | Credit



Get the financial advice you need with **Walkin Wealth BlueStar**

We're committed to helping you reach your financial goals – whether you're planning for retirement, saving for a holiday, securing your child's future, or building your business.

Consulting an accredited financial adviser is essential to help you with some of the most important financial decisions of your life. At **Walkin Wealth BlueStar**, we offer you holistic advice to help you reach your financial goals, achieve sustainable wealth and gain peace of mind.

But what is it that sets a BlueStar business like ours apart?



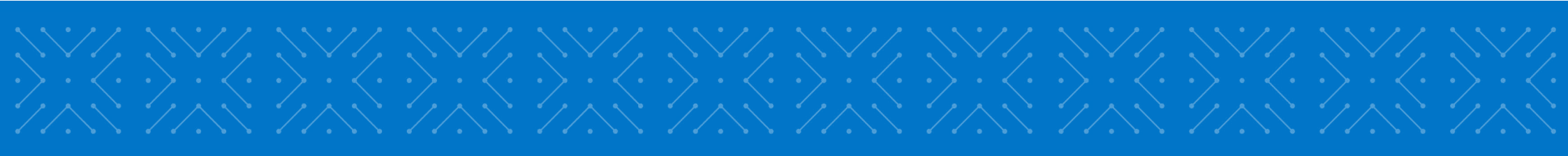
A range of **financial expertise** under one roof

At Walkin Wealth BlueStar, you'll draw on the expertise of a team of financial specialists who can offer you personalised advice and a wide range of financial solutions – from financial planning and insurance to investment advice and retirement planning.

We also offer short-term insurance with our partners MiWay and Santam. And if any of your financial needs can't be addressed by one of our advisers, we'll source an expert for you.

Continuity and **peace of mind**

As a Walkin Wealth BlueStar client, you'll be building a relationship with our team of financial advisers, rather than with a single adviser. And this means that you'll always deal with someone who understands your financial situation and goals and knows your long-term financial plan. This continuity, along with the knowledge that the financial advice we provide is backed by Sanlam, means you can rest assured that your finances are always in good hands.



Our **commitment** to you

At Walkin Wealth BlueStar our dedicated staff members use their knowledge and expertise to help you create sustainable wealth and financial peace of mind.

Our financial planners will help you develop a complete financial plan. This will include information on how to get the amount of cover you need, how to invest your money based on your individual financial situation, how to get the best benefits based on your individual tax structure and how to ensure that your retirement savings portfolio is properly managed.



Products and Services:



We offer a comprehensive range of products and services to help you achieve your financial goals through each stage of your journey covering all your needs from personal income protection, short- and medium-term savings goals, retirement planning and the commercial needs of your business.



Insurance

Personal:

- Life Cover
- Disability Cover
- Severe Illness Cover
- Impairment Cover
- Accident Cover
- Income Protection
- Sickness Benefit
- Funeral Cover

Business:

- Key Person
- Buy and Sell
- Contingent liability

Short-term Insurance

- Property
 - Personal
 - Commercial / Business
- Engineering
- Vehicle
- Liability

Retirement

- Retirement Annuities
- Pension Funds
- Provident Funds
- Preservation Funds
- Living Annuities

Investments

- Tax-free investments
- Unit Trusts
- Various options on LISP (Linked Investments)
- ILLAs / ILLIs
- Endowments
- Preservation funds
- International/ Offshore options
- Life Annuities
- Term Annuities
- Saving plans
- Short/Long term Investments
- Diversified investments – Glacier by Sanlam
- Collective Investments



Loyalty Program

- Reality

Medical Insurance

- Gap Cover
- Medical Aid (Fedhealth)

Employee Benefits

- Retirement funding

Estate Planning

- Wills
- Trusts
- Guardian Trusts
- Beneficiary Fund
- Estate Administration

Through our association with our partners, we can offer clients access to the following services:

- Accounting and Tax Services



Meet the team



Pieter Van der Vyver
Authorised Principal /
Senior Financial Planner
CFP IQA



Calvin Windvogel
Senior Financial Planner
NQF5



Mavin Manuel
Senior Financial Planner
NQF5 IQA



Anzio Lotteriet
Financial Planner



Chanadia Rasmus
Short-Term Adviser



Renee Isaacs
Administrative Assistant



Samanthe Johannes
Administrative Assistant





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Sanlam Life Insurance Limited is a licensed life insurer, an authorised financial services provider and a registered credit provider (NCRCP43).